

# **ENGINEER'S REPORT**

**Prepared for the**

**CITY OF SAN DIEGO**

**Carmel Valley  
Maintenance Assessment District**

**Annual Update for Fiscal Year 2004**

**under the provisions of the**

**San Diego Maintenance Assessment District Ordinance  
of the San Diego Municipal Code**

**and**

**Landscape and Lighting Act of 1972  
of the California Streets and Highways Code**

**Prepared by**

**BOYLE ENGINEERING CORPORATION  
7807 Convoy Court, Suite 200  
San Diego, CA 92111  
(858) 268-8080**

**May 2003**

# **CITY OF SAN DIEGO**

## **Mayor**

Dick Murphy

## **City Council Members**

Scott Peters  
District 1

Brian Maienschein  
District 5

Michael Zucchet  
District 2

Donna Frye  
District 6

Toni Atkins  
District 3

Jim Madaffer  
District 7

Charles Lewis  
District 4

Ralph Inzunza, Jr.  
District 8

## **City Manager**

Michael T. Uberuaga

## **City Attorney**

Casey Gwinn

## **City Clerk**

Charles G. Abdelnour

## **City Engineer**

Frank Belock

## **Assessment Engineer**

Boyle Engineering Corporation

# Table of Contents

---

## Engineer's Report

### Carmel Valley Maintenance Assessment District

Preamble .....	1
Executive Summary .....	2
Background .....	3
District Proceedings for Fiscal Year 2004 .....	3
Bond Declaration .....	4
District Boundary .....	4
Project Description .....	4
Separation of General and Special Benefits .....	5
Cost Estimate .....	5
Estimated Costs .....	5
Annual Cost Indexing .....	5
Method of Apportionment .....	6
Estimated Benefit of Improvements .....	6
Apportionment Methodology .....	7
Equivalent Benefit Units (EBUs) .....	7
Land Use Factor .....	7
Benefit Factor .....	9
Unit Assessment Rate .....	11
Summary Results .....	14

## EXHIBITS

Exhibit A: Boundary Map

Exhibit B: Estimated Annual Expenses, Revenues & Reserves

Exhibit C: Assessment Roll

# Engineer's Report Carmel Valley Maintenance Assessment District

---

## Preamble

Pursuant to the provisions of the "San Diego Maintenance Assessment District Ordinance" (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the "Landscape and Lighting Act of 1972" (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of "Proposition 218" (being Article XIID of the California Constitution), and provisions of the "Proposition 218 Omnibus Implementation Act" (being California Senate Bill 919) (the aforementioned provisions are hereinafter referred to collectively as "Assessment Law"), in connection with the proceedings for the CARMEL VALLEY MAINTENANCE ASSESSMENT DISTRICT (hereinafter referred to as "District"), BOYLE ENGINEERING CORPORATION, as Assessment Engineer to the City of San Diego for these proceedings, submits herewith this report for the District as required by California Streets and Highways Code Section 22565.

FINAL APPROVAL, BY RESOLUTION NO. \_\_\_\_\_,  
ADOPTED BY THE CITY COUNCIL OF THE CITY OF SAN  
DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, ON THE  
\_\_\_\_\_ DAY OF \_\_\_\_\_, 2003.

---

Charles G. Abdelnour, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

## Executive Summary

**Project:** Carmel Valley  
Maintenance Assessment District

**Apportionment Method:** Equivalent Benefit Unit (EBU)

	<b>FY 2003</b>	<b>FY 2004 <sup>(1)</sup></b>	<b>Maximum <sup>(2)</sup> Authorized</b>
<b>Total Parcels Assessed:</b>	8,693	8,700	--
<b>Total Estimated Assessment:</b>	\$1,369,979	\$1,423,906	--
<b>Total Number of EBUs:</b>	14,882.63	14,881.93	--
<i>Zone 1</i>	7,634.89	7,634.89	--
<i>Zone 2</i>	992.34	992.34	--
<i>Zone 3</i>	1,238.73	1,238.03	--
<i>Zone 4</i>	1,159.22	1,159.22	--
<i>Zone 5</i>	1,236.83	1,236.83	--
<i>Zone 6</i>	1,017.35	1,017.35	--
<i>Zone 7</i>	1,037.13	1,037.13	--
<i>Zone 8</i>	386.54	386.54	--
<i>Zone 9</i>	179.60	179.60	--
<b>Assessment Per EBU:</b>			
<i>Zone 1</i>	\$57.38	\$59.65 <sup>(3)</sup>	\$59.65 <sup>(3)</sup>
<i>Zone 2</i>	\$140.26	\$145.80 <sup>(3)</sup>	\$156.34
<i>Zone 3</i>	\$314.52	\$326.94 <sup>(3)</sup>	\$326.94 <sup>(3)</sup>
<i>Zone 4</i>	\$57.38	\$59.65 <sup>(3)</sup>	\$59.65 <sup>(3)</sup>
<i>Zone 5</i>	\$57.38	\$59.65 <sup>(3)</sup>	\$59.65 <sup>(3)</sup>
<i>Zone 6</i>	\$57.38	\$59.65 <sup>(3)</sup>	\$59.65 <sup>(3)</sup>
<i>Zone 7</i>	\$151.08	\$157.05 <sup>(3)</sup>	\$157.05 <sup>(3)</sup>
<i>Zone 8</i>	\$104.00	\$108.11 <sup>(3)</sup>	\$147.59
<i>Zone 9</i>	\$57.38	\$59.65 <sup>(3)</sup>	\$59.65 <sup>(3)</sup>

<sup>(1)</sup> FY 2004 is the City's Fiscal Year 2004, which begins July 1, 2003 and ends June 30, 2004. Total Parcels Assessed, Total Estimated Assessment, and Total Number of EBUs may vary from prior fiscal year values due to parcel changes and/or land use re-classifications.

<sup>(2)</sup> Maximum Authorized annual amounts subject to cost indexing provisions as set forth in this Engineer's Report.

<sup>(3)</sup> Fiscal Year 2003 maximum authorized annual assessment increased by cost indexing factor of 3.95%.

**Proposition 218 Compliance:**

The District was re-engineered in FY 1999 for compliance with Proposition 218. By a ballot proceeding, majority property owners (80.7% of the weighted vote) approved FY 1999 assessments, maximum authorized assessments for subsequent years, and provisions for annual cost indexing.

**Annual Cost Indexing:**

An increase of assessments, under authority of annual cost indexing provisions, is required for Fiscal Year 2004.

**Bonds:**

No bonds will be issued in connection with this District

---

## Background

The Carmel Valley Maintenance Assessment District (District) is bounded by Interstate 5 to the west, Carmel Valley Road (Highway 56) to the south, and the community planning area boundaries to the north and east. The Carmel Valley planning area boundary was expanded easterly by an amendment to the Neighborhood 4 Precise Plan adopted July 30, 1996. Annexation of the new area was proposed as part of Fiscal Year 1999 proceedings.

The improvements comprising the District consist of landscaped medians, paved medians, landscaped right-of-ways, landscaped slopes, revegetated native perimeter slopes, mini parks (enhanced open space/green belts), community parks with various park amenities, gutters, brow ditches, and freeway easements. The purpose of the District is to provide for the maintenance of these improvements.

The maintenance performed on the community parks is for services that exceed the general fund contribution toward community park maintenance. The City makes a general benefit contribution to the community parks at the same level of contribution as other community parks throughout the City. The grounds of the Public Library located in this district are also maintained through the same contract. However, the district is reimbursed for these costs by the City's general fund.

The District was re-engineered in Fiscal Year 1999 for compliance with Proposition 218. By a mail ballot proceeding, property owners approved the re-engineering with 80.7% of weighted votes supporting the proposed assessments.

The Engineer's Report, preliminarily accepted by Resolution Number R-290069 on May 11, 1998, proposed Fiscal Year 1999 assessments, maximum authorized assessments for subsequent years, and provisions for annual cost indexing of the maximum authorized assessments.

---

## District Proceedings for Fiscal Year 2004

This District is authorized and administered under the provisions of the "San Diego Maintenance Assessment District Ordinance" (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the "Landscape and Lighting Act of 1972" (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of "Proposition 218" (being Article XIII D of the California Constitution), and

provisions of the "Proposition 218 Omnibus Implementation Act" (being California Senate Bill 919) (the aforementioned provisions are hereinafter referred to collectively as "Assessment Law"). This report has been prepared in compliance with Assessment Law.

The purpose of the proposed proceedings and this Engineer's Report is to update the District budget and assessments for Fiscal Year 2004. The Fiscal Year 2004 assessments proposed within this Engineer's Report represent a 3.95% increase over the previous year's assessments. This increase is under the authority of annual cost indexing provisions approved by property owners. Therefore, the vote requirements of Section 4 of Article XIID do not apply to these proceedings.

A public hearing will be scheduled where public testimony will be heard by the Council, and the Council may, at its discretion, adopt a resolution ordering the levying of the proposed assessments.

### **Bond Declaration**

No bonds will be issued in connection with this District.

---

## **District Boundary**

The Boundary Map & Assessment Diagram for the Carmel Valley Landscape Maintenance District are on file in the Special Districts Administration Office and the Office of the City Clerk of the City of San Diego and by reference are made a part of this report. A copy of the Boundary Map is included as Exhibit A.

The map details the District boundary, zone boundaries and the location of the improvements maintained by the District. Zone 9 comprises the area added by amendment to the Neighborhood 4 Precise Plan.

---

## **Project Description**

The project to be funded by the proposed assessments is the maintenance of approximately 4.91 acres of landscaped medians, 3.40 acres of paved medians, 6.99 acres of landscaped right-of-ways, 48.66 acres of landscaped slopes, 5.63 acres of revegetated native perimeter slopes, 39.42 acres of mini parks, 56,718 linear feet of gutters and brow ditches, and 1.08 acres of freeway easements. The approximate locations of the improvements to be maintained by the District are

depicted in Exhibit A. Maintenance activities include, but are not limited to, turf mowing and edging, irrigation, gutter sweeping, collection and disposal of fallen branches and trees, tree and bush trimming, fertilizing, weeding, irrigation, irrigation system maintenance, and ongoing inspection and repairs.

The specifications for the maintenance to be performed are contained in the following City contracts: Y4606/02, L6574/98, L3499/01, L3424/01, L3534/01, L6573/98. These City contracts (incorporated herein by reference) are on file with the City Clerk and the Park and Recreation Department, and are available for public inspection during normal business hours.

---

## **Separation of General and Special Benefits**

Consistent with City policy for the public at large, the City will provide the District with annual contributions from the Gas Tax Fund for median maintenance (18.0¢ per square foot of landscaped median and 1.3¢ per square foot of hardscaped median) and from the Environmental Growth Fund for open space maintenance (\$26.63 per acre). In addition, the City makes a standard contribution from the general fund for population-based parks and libraries. These combined allocations are considered to be a “general benefit” administered by the District. All other maintenance, operation, and administrative costs, which exceed the City’s contribution to the public at large, are “special benefits” funded by the District.

---

## **Cost Estimate**

### **Estimated Costs**

Estimated Fiscal Year 2004 annual expenses, revenues, reserves, and assessments (provided by the City) are included as Exhibit B hereto.

### **Annual Cost Indexing**

With the passage of Proposition 218, any proposed increase in assessments must be placed for approval before the property owners by a mail ballot and a public hearing process, similar to these proceedings. A majority of ballots received must be affirmative for the City Council to confirm and levy the increased assessments. For small assessment districts or districts with relatively low dollar assessments, the cost of an engineer’s report, balloting, and the public hearing



process can potentially exceed the total cost of the increase. These incidental costs of the proceedings can be added to the assessments, resulting in even higher assessments.

Indexing assessments annually to the San Diego Consumer Price Index for Urban Consumers (SDCPI-U), or its future equivalent, will allow for minor increases for normal maintenance and operating cost escalation without incurring the costs of the Proposition 218 ballot proceedings. Any significant change in the assessment initiated by an increase in service provided or other significant changes to the District would still require the Proposition 218 proceedings and property owner approval.

The maximum authorized assessment established in the Fiscal Year 1999 proceedings are authorized to be indexed (increased or decreased) annually by the factor published in the SDCPI-U. Fiscal Year 2000 was the first year authorized for such indexing. It has been determined that an increase of assessments, as authorized by the cost indexing provisions, is required for Fiscal Year 2004.

---

## Method of Apportionment

### Estimated Benefit of Improvements

The Transportation Element of the City's General Plan and the general policy recommendations found in the Carmel Valley Community Plan establish several goals for the community's transportation system. The improvements being maintained by this District are consistent with the plan's goals for safety and pleasing aesthetics.

The major and arterial streets within the District are the backbone of the street network within the community. They serve as the primary access routes for inter-community and intra-community trips and thus serve all parcels within the community. All parcels within the District benefit from the enhancement of these streets and the enhanced community image provided by the improvements being maintained by the District. All parcels have been assessed for the maintenance of improvements on the major and arterial streets. The assessment costs associated with these improvements (common to all parcels) are termed "overlay" costs.

The collector/neighborhood streets within the District serve as the primary access routes to and from the major and arterial streets for parcels within a neighborhood, and thus serve the parcels within a

given neighborhood community. Only those parcels served by such collector/neighborhood streets, open space and public landscape maintenance easement areas benefit from their enhancement.

Consistent with this concept, the District has been sub-divided into nine (9) neighborhood zones as shown in Exhibit A. Parcels within each zone have been assessed for the maintenance of the improvements on the collector/neighborhood streets, open space and public landscape maintenance easement areas serving their respective neighborhood zone. The assessment costs associated with these improvements are termed “zone” costs.

Zones 1, 4, 5, 6, and 9 currently maintain the collector/neighborhood streets, open space and public landscape maintenance easement areas serving their respective neighborhood through a home owners association or by other means. Therefore, “zone” costs for their neighborhood zones are zero (i.e., the zones have been assessed for “overlay” costs only).

### **Apportionment Methodology**

The total assessment for a given parcel is equal to the parcel’s total EBUs multiplied by the Unit Assessment Rate (unique to the zone in which parcel is situated) as shown in the following equation:

$$\text{Total Assessment} = \text{Total EBUs} \times \text{Unit Assessment Rate}$$

### **Equivalent Benefit Units (EBUs)**

EBUs for each parcel have been determined as a function of two factors, a Land Use Factor and a Benefit Factor, related as shown in the following equation:

$$\text{EBUs} = (\text{Acres or Units}) \times \text{Land Use Factor} \times \text{Benefit Factor}$$

Each of these factors are discussed below.

#### ***Land Use Factor***

Since the improvements to be maintained by the District are primarily associated with the Transportation Element of the General and Community Plans, trip generation rates for various land use categories (as previously established by the City’s

Transportation Planning Section) have been used as the primary basis for the development of Land Use Factors. While these trip generation rates strictly address only vehicular trips, they are also considered to approximately reflect relative trip generation for other modes of transportation (e.g., pedestrian trips, bicycle trips, etc.), and are considered the best available information for these other transportation modes.

The special benefits of landscape improvements maintained by the District are linked to trip generation primarily by the public safety and aesthetic enhancement enjoyed by travelers through the community. Trip generation rates provide the required nexus and basis for assigning ratios of maximum potential benefit to the various land use/zoning classifications as defined by the City's Municipal Code.

Land use/zoning classifications have been grouped with averaged trip generation rates assigned to establish the Land Use Factors as shown in Table 1.

**TABLE 1: Land Use Factors**

<b>Land Use/Zoning</b>	<b>Code</b>	<b>Land Use Factor</b>
Residential – Single Family (detached)	SFD	1.0 per dwelling unit
Residential – Condominium	CND	0.7 per dwelling unit
Residential – Multi-Family & Apartment	MFR	0.7 per dwelling unit
Residential – Duplex	DUP	0.7 per dwelling unit
Residential – Convalescent & Retirement	CNV	0.3 per dwelling unit
Agricultural	AGR	0.02 per acre
Commercial – Office & Retail	COM	45.0 per acre
Church & House of Worship	CRH	2.8 per acre
Educational – Primary & Secondary	EPS	5.0 per acre
Fire/Police Station	FPS	15.0 per acre
Hotel	HTL	15.0 per acre
Industrial	IND	15.0 per acre
Library	LIB	40.0 per acre
Open Space (designated)	OSP	0 per acre
Park – Undeveloped	PKU	0.5 per acre
Recreational Facility	REC	3.0 per acre
Street/Roadway	STR	0 per acre
Undevelopable	UND	0 per acre
Utility Facility	UTL	0 per acre

Designated Open Space serves primarily to preserve natural

landscape and habitat. While access for study and passive recreation is sometimes permitted, these activities are usually allowed only to the limited extent consistent with the primary purpose of natural preservation. Since this land is essentially “unused” in the customary terms of land use (which relate to human use, not use by nature), the trip generation rate is zero. Therefore, the designated Open Space receives no benefit from the Transportation Element and has been assigned a Land Use Factor of zero.

While those traveling streets and roadways enjoy the improvements maintained by the District during their travel, the actual benefit of this enjoyment accrues to the lands at the origins and destinations of their trips, not to the lands of the streets and roadways, themselves. Accordingly, the Street/Roadway category receive no benefit and have been assigned a Land Use Factor of zero.

The Utility Facility category applies to utility infrastructure facilities, such as water tanks, pump stations, electric power transformer stations, etc. Utility company administrative offices are not included in this category.

### ***Benefit Factor***

The Land Use Factor described above reflects the relative intensity of use (or potential use) of the various parcels of land to be assessed. It does not address the relationship of this use to the specific improvements to be maintained by the District. This relationship is reflected in the Benefit Factor utilized in the assessment methodology.

In determining the Benefit Factor for each land use category, the subcomponents of the benefits of District improvements considered may include some or all of the following: public safety, view corridors and aesthetics, enhancement of community identity, drainage corridors, and recreational potential. As Benefit Factors and their subcomponents are intended to reflect the particular relationships between specific land uses within a district and the specific improvements maintained by the district, Benefit Factors will generally vary from one district to another, based on the specific character and nature of the applicable land uses and improvements maintained.

The applicable benefit subcomponents and resultant composite

Benefit Factors determined for the various Land Use/Zoning categories within this District are as shown in Table 2.

**TABLE 2: Benefit Factors by Land Use**

<b>Land Use/Zoning</b>	<b>Public Safety (max. 0.3)</b>	<b>Aesthetics (max. 0.7)</b>	<b>Composite Benefit Factor (max. 1.0)</b>
Residential – All	0.3	0.7	1.0
Agricultural	0.3	0.0	0.3
Commercial – Office & Retail	0.3	0.3	0.6
Church & House of Worship	0.3	0.3	0.6
Educational – Primary & Secondary	0.3	0.3	0.6
Fire/Police Station	0.3	0.3	0.6
Hotel	0.3	0.3	0.6
Industrial	0.3	0.3	0.6
Library	0.3	0.3	0.6
Open Space (designated)	0.3	0.0	0.3
Park – Undeveloped	0.3	0.0	0.3
Recreational Facility	0.3	0.3	0.6
Street/Roadway	0.3	0.0	0.3
Undevelopable	0.3	0.0	0.3
Utility Facility	0.3	0.0	0.3

**Public Safety.** All land uses are considered to receive the maximum available benefit from the public safety element of District improvements. Public safety is essential to all land uses, and even to lands, such as designated Open Space, held in stewardship with only incidental human use.

**Aesthetics.** The degree of benefit received from the aesthetic qualities of landscaped and hardscaped roadway medians, rights-of-way, vegetated slopes, open space, and parks maintained by the District varies among land use categories. Generally, by nature of their use, residential lands receive the greatest benefit from the reduced traffic congestion, reduced noise levels, greater separation from traffic and generally more tranquil environment provided by landscaped and hardscaped roadway medians and rights-of-way. Commercial and institutional uses, on the other hand, often thrive on higher densities, greater traffic access, and a higher level of activity in the vicinity of their enterprises. These uses, accordingly, receive a lesser degree of benefit from the general insulation and separation provided by the aesthetic elements of District improvements.

Lands in the Open Space, Street/Roadway, and Utility Facility categories are considered to receive no significant benefit from the aesthetic elements of District improvements, as enhanced aesthetic quality of other lands in their vicinity does not affect their function, use, or value. Lands in the Golf Course and Park categories are considered to receive no significant benefit from the aesthetic elements of District improvements, as the aesthetic values of these lands are themselves so high that they are little enhanced by those of other lands in their vicinity.

### **Unit Assessment Rate**

As previously mentioned, all parcels have been assessed for the maintenance of improvements on the major and arterial streets. The assessment costs associated with these improvements (common to all parcels) are termed “overlay” costs. Parcels within each neighborhood zone have been assessed for the maintenance of the improvements on the collector/neighborhood streets, open space, and landscape easements serving their respective neighborhood zone. The assessment costs associated with these improvements are termed “zone” costs.

The total “overlay” costs have been apportioned to each parcel in proportion to the parcel’s estimated EBUs relative to the total of all District EBUs. The total “zone” costs have been apportioned to each parcel in proportion to the parcel’s estimated EBUs relative to the total of all EBUs within the neighborhood zone.

The Unit Assessment Rate (rate per EBU) is equal to the sum of the “overlay” unit rate and the “zone” unit rate as shown in the following equation:

$\text{Unit Assessment Rate} = \text{Overlay Unit Rate} + \text{Zone Unit Rate}$
--

Table 3 summarizes the FY 2004 (from July 1, 2003 to June 30, 2004) and maximum authorized unit assessment rates.

**TABLE 3: Unit Assessment Rates**

	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>
<b>Fiscal Year 2004 <sup>(1)</sup></b>					
Overlay Cost	\$455,432	\$59,193	\$73,848	\$69,157	\$73,785
Zone Cost	\$0	\$85,490	\$330,915	\$0	\$0
Total Cost	\$455,432	\$144,683	\$404,763	\$69,157	\$73,785
EBUs	7,634.89	992.34	1,238.03	1,159.22	1,236.83
Overlay Unit Rate	\$59.65	\$59.65	\$59.65	\$59.65	\$59.65
Zone Unit Rate	\$0	\$86.15	\$267.29	\$0	\$0
Unit Assessment Rate <sup>(2)</sup>	\$59.65	\$145.80	\$326.94	\$59.65	\$59.65
<b>Maximum Authorized for Subsequent Fiscal Years <sup>(3)</sup></b>					
Overlay Cost	--	--	--	--	--
Zone Cost	--	--	--	--	--
Total Cost	--	--	--	--	--
EBUs	--	--	--	--	--
Overlay Unit Rate	\$59.65	\$59.65	\$59.65	\$59.65	\$59.65
Zone Unit Rate	\$0	\$96.69	\$267.29	\$0	\$0
Unit Assessment Rate	\$59.65	\$156.34	\$326.94	\$59.65	\$59.65

	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>	<b>Zone 9</b>	<b>Total</b>
<b>Fiscal Year 2004 <sup>(1)</sup></b>					
Overlay Cost	\$60,688	\$61,865	\$23,057	\$10,715	\$887,740
Zone Cost	\$0	\$101,026	\$18,735	\$0	\$536,166
Total Cost	\$60,688	\$162,891	\$41,792	\$10,715	\$1,423,906
EBUs	1,017.35	1,037.13	386.54	179.60	14,881.93
Overlay Unit Rate	\$59.65	\$59.65	\$59.65	\$59.65	--
Zone Unit Rate	\$0	\$97.40	\$48.46	\$0	--
Unit Assessment Rate <sup>(2)</sup>	\$59.65	\$157.05	\$108.11	\$59.65	--
<b>Maximum Authorized for Subsequent Fiscal Years <sup>(3)</sup></b>					
Overlay Cost	--	--	--	--	--
Zone Cost	--	--	--	--	--
Total Cost	--	--	--	--	--
EBUs	--	--	--	--	--
Overlay Unit Rate	\$59.65	\$59.65	\$59.65	\$59.65	--
Zone Unit Rate	\$0	\$97.40	\$87.94	\$0	--
Unit Assessment Rate	\$59.65	\$157.05	\$147.59	\$59.65	--

<sup>(1)</sup> Fiscal Year 2004 begins July 1, 2003 and ends June 30, 2004.

<sup>(2)</sup> Fiscal Year 2003 annual assessment increased by cost indexing factor of 3.95%.

<sup>(3)</sup> Subject to cost indexing provisions as set forth in this Engineer's Report.

As described above, the total assessment assigned to each parcel in the District has been calculated, based on the preceding factors, as follows:

$\text{Total Assessment} = \text{Total EBU's} \times \text{Unit Assessment Rate}$
---

Based on the above formula, the EBU's, unit assessment rate, and total assessment calculated for each property, can be found in the Assessment Roll (Exhibit C).



---

## Summary Results

The District Boundary Map is shown in Exhibit A.

An estimate of the maintenance costs associated with District improvements is shown in Exhibit B.

The assessment methodology utilized is as described in the text of this report. Based on this methodology, the EBU's and Fiscal Year 2004 District assessment for each parcel were calculated and are shown in the Assessment Roll (Exhibit C).

Each lot or parcel of land within the District has been identified by unique County Assessor's Parcel Number on the Assessment Roll and the Boundary Map and Assessment Diagram referenced herein. The net assessment for each parcel for Fiscal Year 2004 can be found on the Assessment Roll.

This report has been prepared and respectfully submitted by:

BOYLE ENGINEERING CORPORATION

---

Eugene F. Shank, PE C 52792

---

Alex Bucher, EIT CA 112628

I, \_\_\_\_\_, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the Assessment as shown on the Assessment Roll, together with the Assessment Diagram, both of which are incorporated into this report, were filed in my office on the \_\_\_\_\_ day of \_\_\_\_\_, 2003.

---

Charles G. Abdelnour, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

I, \_\_\_\_\_, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the assessment diagram incorporated into this report, was approved and confirmed by the CITY COUNCIL of said City on the \_\_\_\_\_ day of \_\_\_\_\_, 2003.

---

Charles G. Abdelnour, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

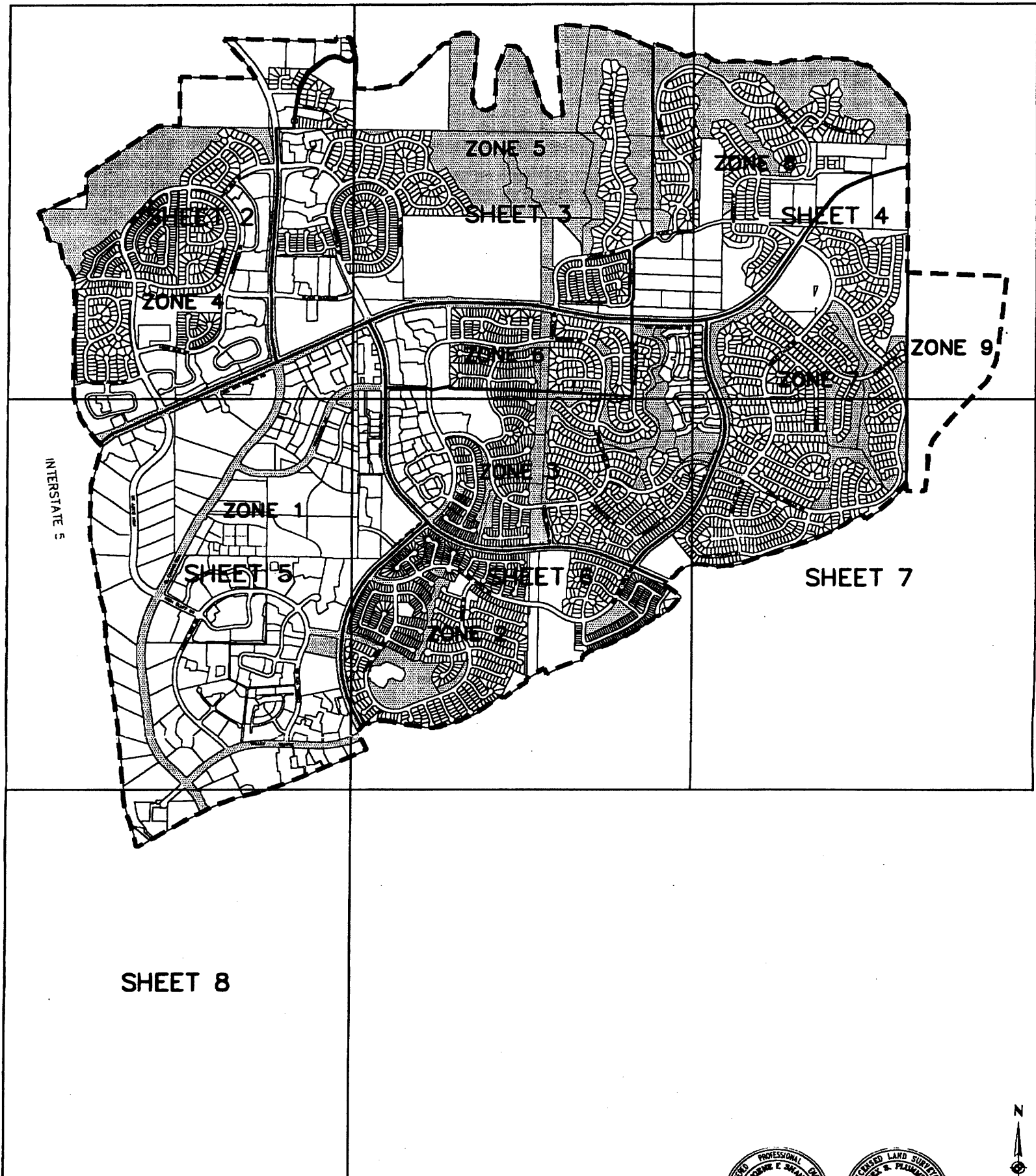
I, \_\_\_\_\_, as SUPERINTENDENT OF STREETS of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the assessment diagram was recorded in my office on the \_\_\_\_\_ day of \_\_\_\_\_, 2003.

---

SUPERINTENDENT OF STREETS  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

---

# **EXHIBIT A**



BOUNDARY MAP



FILED IN THE OFFICE OF THE CITY CLERK OF THE CITY OF SAN DIEGO, STATE OF CALIFORNIA, THIS \_\_\_\_ DAY OF \_\_\_\_, 1998.

CHARLES G. ABDELNOUR, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

I HEREBY CERTIFY THAT THE WITHIN MAP SHOWING PROPOSED BOUNDARIES OF THE CARMEL VALLEY LANDSCAPE MAINTENANCE DISTRICT, CITY OF SAN DIEGO, STATE OF CALIFORNIA, WAS APPROVED BY THE CITY COUNCIL AT A REGULAR MEETING THEREOF, HELD ON THE \_\_\_\_ DAY OF \_\_\_\_, 1998, BY ITS RESOLUTION NO. \_\_\_\_.

CHARLES G. ABDELNOUR, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

AN ASSESSMENT WAS LEVIED BY THE CITY COUNCIL OF THE CITY OF SAN DIEGO ON THE LOTS, PIECES, AND PARCELS OF LAND SHOWN ON THIS ASSESSMENT DIAGRAM. SAID ASSESSMENT WAS LEVIED ON THE \_\_\_\_ DAY OF \_\_\_\_, 1998; SAID ASSESSMENT DIAGRAM AND THE ASSESSMENT ROLL WERE RECORDED IN THE OFFICE OF THE SUPERINTENDENT OF STREETS OF THE CITY OF SAN DIEGO, STATE OF CALIFORNIA ON THE \_\_\_\_ DAY OF \_\_\_\_, 1998. REFERENCE IS MADE TO THE ASSESSMENT ROLL RECORDED IN THE OFFICE OF THE SUPERINTENDENT OF STREETS FOR THE EXACT AMOUNT OF EACH ASSESSMENT LEVIED AGAINST EACH PARCEL OF LAND SHOWN ON THIS ASSESSMENT DIAGRAM.

NOTE:  
FOR A DETAILED DESCRIPTION OF THE LINES AND DIMENSIONS OF LOTS OR PARCELS SHOWN ON THIS MAP, REFER TO THE COUNTY ASSESSOR'S MAPS WHICH SHALL GOVERN WITH RESPECT TO ALL DETAILS CONCERNING THE LINES AND DIMENSIONS OF SUCH LOTS OR PARCELS.

LEGEND:  
--- DISTRICT BOUNDARY  
--- ZONE BOUNDARY  
--- DISTRICT IMPROVEMENTS  
--- PARCEL LINE



CITY OF  
SAN DIEGO

CARMEL VALLEY  
LANDSCAPE MAINTENANCE DISTRICT

W.O. DATE: REVISIONS:

# **EXHIBIT B**

# Maintenance Assessment Districts

Council District: 1

Carmel Valley

Fund: 70220

Carmel Valley Maintenance Assessment District			
	FY 2002 ACTUAL	FY 2003 BUDGET	FY 2004 PROPOSED
Positions	2.00	2.00	2.00
Personnel Expense	\$ 133,065	\$ 150,218	\$ 150,600
Non-Personnel Expense	1,055,902	1,582,628	1,975,131
<b>TOTAL</b>	<b>\$ 1,188,967</b>	<b>\$ 1,732,846</b>	<b>\$ 2,125,731</b>

The Carmel Valley Maintenance Assessment District (District) was established in July 1987 to provide maintenance for landscaped medians, paved medians, landscaped rights-of-way, slopes, mini-parks, community parks, and open space within the District boundaries. The District maintains 4.91 acres of landscaped medians, 3.40 acres of paved medians, 6.99 acres of landscaped rights-of-way, 48.66 acres of landscaped slopes, 5.63 acres of revegetated native perimeter slopes, 39.42 acres of mini parks, 56,718 linear feet of gutters and brow ditches, 6.72 acres of sidewalks, 1.08 acres of freeway easements, and 81.14 acres of open space. The Carmel Valley Community Planning Board approved the Fiscal Year 2004 Proposed Budget on March 17, 2003.

CARMEL VALLEY	FY 2003 ESTIMATE	FY 2004 PROPOSED
<b>BALANCE</b>	\$ 436,699	\$ 636,003
<b>Revenue</b>		
Assessments	\$ 1,369,980	\$ 1,423,906
Interest	16,180	30,415
Transfer from General Fund	5,017 <sup>(1)</sup>	- <sup>(1)</sup>
Developer Contributions	207,000	-
City Contributions	17,892 <sup>(2)</sup>	35,407 <sup>(3)</sup>
<b>TOTAL OPERATING REVENUE</b>	<b>\$ 1,616,069</b>	<b>\$ 1,489,728</b>
<b>TOTAL REVENUE AND BALANCE</b>	<b>\$ 2,052,768</b>	<b>\$ 2,125,731</b>
<b>Expense</b>		
Personnel	\$ 150,114	\$ 150,600
Contractual	798,104	879,275
Incidental	204,651	220,267
Utilities	263,896	340,494
Contingency Reserve	-	535,095
<b>TOTAL EXPENSE</b>	<b>\$ 1,416,765</b>	<b>\$ 2,125,731</b>
<b>BALANCE</b>	<b>\$ 636,003</b>	<b>\$ -</b>
<b>Assessment per EBU: <sup>(4)</sup></b>	<b>FY 2003 Total Assessment</b>	<b>FY 2004 Total Assessment</b>
<b>Zones 1, 4, 5, 6 &amp; 9</b>	\$ 57.38	\$ 59.65 <sup>(5)</sup>
<b>Zone 2</b>	\$ 140.26	\$ 145.80 <sup>(5)</sup>
<b>Zone 3</b>	\$ 314.52	\$ 326.94 <sup>(5)</sup>
<b>Zone 7</b>	\$ 151.07	\$ 157.05 <sup>(5)</sup>
<b>Zone 8</b>	\$ 104.00	\$ 108.11 <sup>(5)</sup>

<sup>(1)</sup> In Fiscal Year 2003, the City contributed \$5,017 from the Fire-Rescue Department to cover the maintenance costs for Fire Station #24 at the City's average cost of \$5,017 per station in Fiscal Year 2003. Due to budget constraints, there will not be a contribution from the Fire-Rescue Department in Fiscal Year 2004 for the maintenance of the Fire Station. Maintenance activities performed by the District will cease, and Fire Station personnel will maintain the landscaping in Fiscal Year 2004.

<sup>(2)</sup> In Fiscal Year 2003, the City contributed general benefit of \$31,813 from Gas Tax for maintenance of 176,738 square feet of landscaped medians at \$0.18 per square foot, and \$1,433 for maintenance of 110,205 square feet of hardscaped medians at \$0.013 per square foot. In addition, the City has contributed \$2,028 from the Environmental Growth Fund for maintenance of 81.14 acres of open space at \$25 per acre for the Fiscal Year 2002 contribution, and \$2,161 from the Environmental Growth Fund for maintenance of 81.14 acres of open space at \$26.63 per acre for the Fiscal Year 2003 contribution, less a onetime retroactive payback of \$19,543 due to an overpaid contribution for 390.86 acres at \$25 for two years (Fiscal Years 2000 and 2001).

<sup>(3)</sup> In Fiscal Year 2004, the City will contribute general benefit of \$31,813 from Gas Tax for maintenance of 176,738 square feet of landscaped medians at \$0.18 per square foot, and \$1,433 for maintenance of 110,205 square feet of hardscaped medians at \$0.013 per square foot. In addition, the City will contribute \$2,161 from the Environmental Growth Fund for maintenance of 81.14 acres of open space at \$26.63 per acre.

<sup>(4)</sup> The District contains a total of 14,881.93 Equivalent Benefit Units (EBUs). Zone 1 contains 7,634.89 EBU's; Zone 2 contains 992.34 EBU's; Zone 3 contains 1,238.03 EBU's; Zone 4 contains 1,159.22 EBU's; Zone 5 contains 1,236.83 EBU's; Zone 6 contains 1,017.35 EBU's; Zone 7 contains 1,037.13 EBU's; Zone 8 contains 386.54 EBU's; Zone 9 contains 179.60 EBU's.

<sup>(5)</sup> The assessment increase is based on the San Diego Urban Consumer Price Index (SDCPI-U) of 3.95 percent.

# **EXHIBIT C**

Due to the size of the Assessment Roll (Exhibit C), only limited copies are available. Please contact the City of San Diego, Park & Recreation Department, Open Space Division, Maintenance Assessment Districts Program at (619) 685-1350 to review the Assessment Roll.